

2005 Canada Summer Games Economic Impact Assessment

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Canadian Sport Tourism Alliance



Alliance canadienne du tourisme sportif



The following analysis provides an assessment of the estimated economic impact of the 2005 Canada Summer Games, held in Regina, Saskatchewan from August 6 - 20, 2005, as generated by the Sport Tourism Economic Assessment Model.

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1.0 Background

The Canada Games and their lasting legacies continue to be a catalyst for the growth of sport and recreation across our country. Held every two years, alternating between summer and winter, the Games are Canada's largest multi-sport event, representing the pinnacle of interprovincial/territorial sport competition. As the best in their age group, these young competitors come to the Games as representative of their respective province or territory. Since 1967, nearly 50,000 athletes have participated in the Games with hundreds of thousands having engaged in try-outs and qualifying events. In addition, over 90,000 coaches, officials and volunteers have been directly involved in the planning and staging of the Games and have contributed to their enormous reach over a proud 40 year history.

The Canada Games are a key element in the development of Canada's next generation of national, international and Olympic champions. The Games have served as a stepping stone for many of Canada's celebrated athletes, including: Toller Cranston (1967), Bob Gainey (1971), Sylvie Daigle (1979), Catriona LeMay Doan (1983 and 1987), Bruny Surin (1985), Marianne Limpert, Annie Pelletier and Anne Montminy (1989), Hayley Wickenheiser and Marc Gagnon (1991), Steve Nash (1993), Maryse Turcotte (1995), Alexandre Despatie (1997), Adam Van Koeverden (1997) and Sidney Crosby (2003).

The primary beneficiaries of the event from a sport development perspective are the athletes and artists themselves, who are provided with a national venue in which to showcase their talents and strive for excellence. Both the sporting community and the community at large benefit from the Games through the additional infrastructure developed for use during competition. In addition to the infrastructure legacy, host communities also benefit from the national exposure directly related to hosting the Games and volunteer development in support of future events in the region. An additional benefit, and the focus of this study, is the increase in economic activity in the City of Regina and surrounding area, as well as the Province of Saskatchewan as a result of hosting the event in 2005.

The next two sections of the paper cover the spending of travelers, with Section 2 detailing the intercept survey methodology, with the findings of the survey contained within Section 3. Section 4 provides the details regarding other expenditures that contributed to the economic impact of the event; while Section 5 presents the Sport Tourism Economic Assessment Model (STEAM) results from the combined expenditures of the visitors, participants, and the organizing committee's operational expenditures. Section 6 concludes the document; while detailed information regarding the economic impact model is contained within the Appendix, as is a copy of the survey.¹

¹ The economic impact projections detailed in this report were generated by the Canadian Sport Tourism Alliance's (CSTA's) Sport Tourism Economic Assessment Model (STEAM). STEAM, which was developed in 2002, is a model which has been designed to make use of information available to event organizers to prepare consistent and credible economic impact projections. Partners in developing the model have included the Canadian Tourism Commission, the Canadian Association of Convention and Visitor Bureaus, the Canadian Tourism Research Institute (CTRI - a branch of the Conference Board of Canada) and Sport Canada. The model is based on CTRI's TEAM model, which is the most widely used tourism economic impact model in Canada, and STEAM has been calibrated with on-site expenditure surveys from more than twelve different events throughout the country. A more detailed description of STEAM is contained within Appendix 1. In addition, STEAM or TEAM have been used to prepare economic impact assessments of the 1999, 2001, and 2003 Canada Games, with the details of these events contained within Appendix 3. The methodology and conventions used in preparing those economic impact assessments are consistent with those used to prepare this assessment.

2.0 Methodology

Intercept surveys were conducted on site at all of the venues of the Games over the entire 16-day period. Visitors were intercepted while watching the event, while the majority of participants were intercepted at the University of Regina, the location of the athletes' residence, as well as at their respective event venue. The surveys were conducted using Palm PDAs with Techneos Entryware Pro survey software, provided by Techneos Systems of Vancouver, BC. A copy of the survey instrument is contained in Appendix 3.

A total of 1,179 intercepts were made over the two-week period; however 125 respondents declined to participate while 46 had been questioned previously; yielding 1,008 valid survey responses. A further 27 surveys were incomplete, yielding a total of 959 responses. The complete breakdown of traveler origin is contained within Table 2.1, below.

Table 2.1 Survey & Population Estimates

| Origin Category | Survey Responses | Estimated Population | Confidence Interval (+/-%) ² |
|-------------------------|------------------|----------------------|---|
| Local | 207 | 6,757 | |
| 80km-320km | 59 | 2,100 | 12.5% |
| 320km+ Intra-provincial | 12 | 510 | 28.0% |
| Interprovincial | 426 | 8,941 | 4.6% |
| Total Spectators | 497 | 18,308 | 4.3% |

The estimated attendance figures contained within Table 2.1 were derived through the survey and estimated attendance figures were provided by the organizing committee. As a result of the small sample size for Saskatchewan visitors traveling more than 320 km, they will be merged with the long distance (out of province) travelers throughout the remaining analysis.

² This confidence interval gives the range in the estimate that is attributable to the use of a random sample. Other errors, such as response bias may also be present; however these would not be included in the reported confidence interval.

3.0 Visitors

Participants

A total of 4,300 athletes, artists, coaches and managers attended the event over the two week period (2,150 per week). In addition, there were a further 450 Games officials (225 per week), and approximately 200 medical staff.

Furthermore, each team sent an average of 15 members as part of the provincial/territorial delegations to provide support for the teams, for a total of 165 mission staff members, the majority of who stayed for the entire two weeks.

Spectators

More than 18,300 unique spectators attended the 2005 Canada Games, of which just over one third were local residents. Not surprisingly, a vast majority of out of town spectators were related to Games participants, with 79% of survey respondents indicating that they were directly related to one of the participants. The trip characteristics of spectators, of which there were just over 11,500 in the out-of-town categories, are reported in Table 3.2.

Of interest from the survey was the importance of the event in the spectator's decision to travel to Regina and surrounding area, with a very large proportion of respondents indicating that the Canada Games were the only reason that they came to the area.

Table 3.2 Spectator Trip Characteristics

| | Local | 80-320km | 320km+ & Interprov. |
|--|-------|----------|---------------------|
| Avg. Number of Events per Party | 12.6 | 14.2 | 26.5 |
| % Same Day | n/a | 32% | 8% |
| # of Day Trips | n/a | 1.3 | 1.8 |
| Average Party Size | 1.9 | 2.4 | 2.6 |
| % of Parties With Children | 26% | 38% | 33% |
| Avg. Length of Stay | 2.9 | 5.8 | 6.9 |
| Games Importance in Travel Decision (1-10) | n/a | 9.4 | 9.5 |

Detailed spending information of out-of-town spectators was captured as a part of the intercept survey, with the results summarized in Table 3.3.

Table 3.3 Average Spending per Party

| Distance Category | 80km-320km | 320km+ & Interprov. |
|----------------------------------|-----------------|---------------------|
| Accommodation | \$115.17 | \$544.71 |
| Restaurants | \$136.91 | \$349.53 |
| Concessions | \$30.43 | \$56.99 |
| Groceries | \$20.21 | \$47.64 |
| Event Tickets | \$77.45 | \$120.50 |
| Other Entertainment | \$32.89 | \$45.19 |
| Event Merchandise | \$29.47 | \$96.26 |
| Other shopping | \$103.72 | \$86.82 |
| Car Rental (Total) | \$0.00 | \$106.43 |
| Vehicle Operations (Gas/Park) | \$70.87 | \$54.59 |
| Taxi/Bus/Metro | \$0.00 | \$9.22 |
| Other Spending | \$54.26 | \$27.20 |
| Total | \$671.38 | \$1,545.08 |

Other Visitors

A number of other visitors contributed to the economic benefit of Regina and region, through their spending while on site. There were approximately 200 media members present, as well as other VIPs who travelled to the Regina area. One example is the federal provincial/territorial sport ministers' meeting that was held in conjunction with the event.

4.0 Other Spending

Capital (Construction)

The Canada Games host society contributed a total of \$6.0 million to construction costs throughout the City of Regina, Moose Jaw, Lumsden, and Saskatchewan Beach, and in many cases, they were just one of many funding partners. Moreover, the Games were an important factor in accelerating a number of other projects throughout Regina. The overall capital impact associated with the Games was nearly \$120 million, of which approximately \$37 million occurred as a direct result of hosting the Games (See Table 4.1).

Table 4.1 Capital Construction Expenditures

| Sport | Venue | 2005 Canada Games Capital Plan | | Related Capital Projects Contributions |
|-----------------------|--|--------------------------------|----------------------|--|
| | | Games Contribution | Other Contributions | |
| Softball | Rambler Park | \$ 800,000 | \$ 146,000 | |
| Athletics | Canada Games Athletic Complex (formerly Douglas Park) | \$ 1,585,000 | \$ - | |
| Baseball/Soccer | Mount Pleasant/Currie Field | \$ 366,775 | \$ 62,244 | |
| Rowing/Canoe | Wascana Lake Race Course | \$ 71,340 | \$ - | |
| Rowing/Canoe | Canada Games Wascana Lake Centre | \$ 318,328 | \$ 206,000 | |
| Sailing | Village of Saskatchewan Beach (Regina Sailing Club) | \$ 105,140 | \$ 20,000 | |
| Basketball/Volleyball | University of Regina Centre for Kinesiology, Health, and Sport | \$ 2,000,000 | \$ 30,000,000 | |
| Cycling | Wascana Trails, Wascana Park, Lumsden | \$ 97,890 | \$ - | |
| Diving/Swimming | Lawson Aquatic Centre | \$ 192,000 | \$ 5,700 | |
| Tennis | Lakeshore Tennis Club | \$ 258,534 | \$ 55,140 | |
| Field Hockey | Taylor Field | \$ 2,053 | \$ - | |
| Rugby | Regina Rugby Club | \$ 35,000 | \$ 10,000 | |
| Softball/Soccer | Elks Park and Soccer Centre (Moose Jaw) | \$ 150,000 | \$ 450,000 | |
| Various | Signage | \$ 17,414 | \$ - | |
| Other | Other (GST) | \$ 1,117 | \$ - | |
| Wrestling | Credit Union Eventplex | | | \$ 12,000,000 ¹ |
| Rowing/Canoe | Wascana Lake Project | | | \$ 18,000,000 ² |
| Athletes' Village | University of Regina Residences | | | \$ 38,000,000 ³ |
| Other | Regina International Airport | | | \$ 15,000,000 ⁴ |
| | Total | \$ 6,000,591 | \$ 30,955,084 | \$ 83,000,000 ⁵ |

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¹ The 2005 Canada Games played a pivotal role in securing the funding for this multi-purpose complex which was the venue used for wrestling during the Games and will play an essential role in meeting the needs of community activities and events for years to come.

² The 2005 Canada Games presented an opportunity to renew interest and move forward the lake deepening project in Wascana Centre.

³ The University of Regina, as part of the bid to host the Games, made a commitment to ensure new residences would be constructed in time to host the Athletes' Village for the Games.

⁴ The Regina International Airport expansion was advanced to be completed in time for the Games.

⁵ While the Canada Games made use of these facilities, these construction projects would have been completed in the absence of the Games, thus the \$83 million is not considered as part of the economic impact directly associated with the Games.

Furthermore, operational expenditures made a significant contribution to the economic impact of the Games, with a total cash budget of nearly \$10.5 million, with an additional \$3.1 million³ in profit from the event remaining in the province through the 2005 Canada Summer Games Legacy Program. The operational expenditures were distributed in the categories shown below. In addition, the event was supported by considerable value in kind donations, totalling in excess of \$7.9 million.⁴ An additional non-financial contribution to the Games was the nearly 6,000 volunteers, whose involvement was also critical to the success of the event.

Table 4.2 Operational Expenditures (000's)

| Category | |
|------------------------------|---------|
| Salaries, Fees & Commissions | \$2,467 |
| Advertising | \$220 |
| Professional Services | \$682 |
| Insurance | \$100 |
| Rent | \$257 |
| Other Services | \$1,891 |
| Communications | \$439 |
| Office Supplies | \$95 |
| Other Supplies | \$1,327 |
| Repairs | \$118 |
| Food & Beverage - OC | \$60 |
| Food & Beverage - Athletes | \$970 |
| Food & Beverage - VIP | \$105 |
| Accommodation - Athletes | \$970 |
| Accommodation - VIP | \$78 |
| GST | \$40 |

³ While the total operating profit was \$3.2 million, of which \$3.1 million will remain in the province of Saskatchewan.

⁴ Value in kind donations, as well as the contributed time of volunteers, were of critical importance to the success of the event. However, as both of these are non-traditional economic transactions, and in order to maintain consistency with other studies, they have been excluded from the economic impact.

5.0 Results

Total expenditures as a result of the combined capital, visitor and operations expenditure were substantial, totalling nearly 59.8 million. The majority of the economic impact (62%) was as a result of the significant capital construction associated with the Games. Operational expenditures accounted for more than \$13.5 million of the initial expenditure, followed by nearly \$9.3 million of visitor spending. As a result of the initial expenditures, total economic activity in the Province of Saskatchewan is estimated to have exceeded \$101 million, of which nearly \$85.2 million occurred in the City of Regina.

These expenditures supported nearly \$19.5 million in wages and salaries for the City of Regina, with a further \$4.1 million for the rest of the province. Overall, 955 jobs were supported by hosting the Canada Summer Games, with the majority of these based in Regina (793) and a further 162 in the rest of the province. The net economic activity (GDP) generated by the event was just over \$41.0 million, of which nearly \$32.3 million took place in Regina.

Considerable tax revenues were also supported by the event, totalling nearly \$13.1 million. The federal government garnered nearly \$6.5 million in tax revenue, followed by the Province of Saskatchewan with nearly \$5.2 million. Municipalities throughout the province earned more than \$1.5 million, of which nearly \$1.2 million accrued to the City of Regina.

Table 5.1 Potential Provincial Economic Impact by Source (\$000s)

| Category | Operations | Capital | Visitors | Total |
|---------------------|------------|----------|----------|-----------|
| Initial Expenditure | \$13,517 | \$36,956 | \$9,285 | \$59,757 |
| Industry Output | \$30,233 | \$54,260 | \$16,855 | \$101,349 |
| GDP | \$12,478 | \$21,435 | \$7,116 | \$41,029 |
| Wages & Salaries | \$7,979 | \$11,628 | \$3,917 | \$23,524 |
| Taxes - Total | \$4,154 | \$5,979 | \$2,991 | \$13,124 |
| Federal | \$2,117 | \$2,951 | \$1,378 | \$6,446 |
| Provincial | \$1,578 | \$2,319 | \$1,278 | \$5,176 |
| Municipal | \$459 | \$708 | \$336 | \$1,502 |
| Jobs | 282 | 448 | 226 | 955 |

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The construction sector was the largest beneficiary of the Canada Games' economic impact, accounting for just over one quarter (27.3%) of the net economic activity of the Games at \$11.2 million. The service sector also accounted for one quarter of the net economic activity at just over \$10.3 million (25.2%) followed by retail trade at just over \$6.0 million (14.7%).

Employment effects were distributed through different industries due to the prevalence of part time jobs in the service sector as compared to other industries such as construction. For example, a total of 281 jobs were supported in the service sector, whereas the construction industry, which had the largest economic impact, only supported a total of 147 jobs. Employment was also significant in the retail trades (229 jobs).

Table 5.2 Detailed GDP and Employment Estimates

| Industry | GDP | Jobs |
|-----------------------------------|------------|-------------|
| Construction | \$11,202 | 147 |
| Retail Trade | \$6,012 | 229 |
| Finance, Insurance, & Real Estate | \$3,163 | 72 |
| Manufacturing | \$1,893 | 60 |
| Services – Total | \$10,323 | 281 |
| Accommodation | \$1,213 | 51 |
| Food & Beverage | \$1,293 | 82 |
| Other Services | \$7,817 | 149 |

6.0 Conclusion

The 2005 Canada Games provided considerable economic benefits to the Province of Saskatchewan, the City of Regina, the City of Moose Jaw, Lumsden, Saskatchewan Beach, and region. In addition, a number of legacy facilities were built as a result of hosting the Games, which will benefit the community and its citizens in the future. The City of Regina also developed an extensive volunteer base that could support future hosting initiatives.

The combined expenditures of visitors, along with event operations, and capital expenditures were estimated to reach nearly \$59.8 million in the Province of Saskatchewan. This spending generated an estimated \$101 million in economic activity, of which nearly \$85.2 million occurred within the City of Regina. Nearly \$19.5 million in wages and salaries were paid in Regina, with an additional \$4.1 million paid throughout the rest of the province. The event supported an estimated 955 jobs, including 793 in Regina. In sum, the event is estimated to have generated more than \$41.0 million in GDP (new economic activity), of which \$32.3 million occurred in Regina. Hosting the event is estimated to have supported more than \$13.1 million in taxes; of which nearly \$6.5 million accrued to the federal government. Nearly \$5.2 million was collected by the province and \$1.5 million by local governments, including nearly \$1.2 million by the City of Regina.

Appendix 1 – Economic Impact Methodology - STEAM

Background

Briefly, the purpose of STEAM is to calculate both the provincial and regional economic impacts of sport tourism. The economic impacts are calculated on the basis of capital and operating expenditures on goods, services and employee salaries, and on the basis of tourist spending within a designated tourism sector. The elements used to measure the economic impacts are Gross Domestic Product (GDP), Employment, Taxes, Industry Output and Imports. STEAM measures the direct, indirect & induced effects for each of these elements.

Technical Description of the Impact Methodology used by STEAM

STEAM and many other impact studies are based on input-output techniques. Input-Output models involve the use of coefficients that are based on economic or business linkages. These linkages trace how tourist expenditures or business operations filter through the economy. In turn, the coefficients applied are then used to quantify how tourism related activity in a particular region generates employment, taxes, income, etc. The input-output approach indicates not only the direct and indirect impact of tourism but can also indicate the induced effect resulting from the re-spending of wages and salaries generated.

All impacts generated by the model are given at the direct impact stage (i.e. the "front line" businesses impacted by tourism expenditures), indirect impact stage (i.e. those industries which supply commodities and/or services to the "front line" businesses) and the induced impact stage (induced consumption attributable to the wages and salaries generated from both the direct and indirect impact). In this sense, the model is closed with respect to wages. Imports are also determined within the model, so the model is closed with respect to imports. Exports are not endogenized (i.e. additional exports are not assumed with the induced impact) which consequently generates more conservative impacts. Another assumption of the model, which leads to more conservative impacts, is that not all commodities and/or services purchased are assumed to have at least one stage of production within the province. This assumption is crucial for souvenirs, gasoline and other commodities.

Taxes and employment are key economic impacts and as such must involve the use of both input-output and econometric techniques. As the data embodied in the provincial input-output tables are from 1996 (which is the latest currently available), taxes and employment must incorporate current coefficients and/or rates. These coefficients and/or rates are then applied to measures determined within the input-output framework of the model. Determining the level of taxes and employment outside the input-output framework of the model allows rates and/or coefficients to be selectively changed for updating or in order to conduct a scenario analysis.

Regional (Sub-Provincial) Impact Methodology

The method used to simulate intraprovincial commodity flows and ultimately regional impacts follows directly from regional economics principles. The principle is referred to as the "gravity model". Basically the "gravity model" states that the required commodity (& service) inputs will be "recruited" in a manner that takes into consideration economies of scale (i.e. production costs), transportation costs and the availability of specific industries. Economies of scale (i.e. lower production costs) are positively correlated with input demand while greater transportation costs are negatively correlated with input demand. Fulfilling that demand from other provincial regions is contingent on the fact that the specific industry does actually exist. An advantage of using the "gravity model" to simulate intraprovincial commodity flows is that as the industrial composition of the labour force changes, or as new industries appear for the first time in specific regions, the share of production between the various sub-provincial regions also changes.

By following this principle of the gravity model, all sub-provincial regions of a province are assigned a coefficient for their relative economies of scale in each industry (using the latest industry labour force measures) as well as a coefficient to represent the transportation cost involved to get each industry's output to the designated market. One variation on the "gravity model" principle involves the estimation of "relative trade distances" by incorporating different "weights" for different modes of transport. Once these coefficients are generated for all regions and over all industries, a measure of sensitivity (mostly relative to price, but in the case of service industries also to a "local preference criteria") is then applied to all commodities. Another variation on the strict "gravity model" approach is that the measure of sensitivity is adjusted by varying the distance exponent (which in the basic "gravity model" is 2) based on the commodity or service required. The variation in distance exponents revolve, principally, around two research hypotheses: (1) the greater the proportion of total shipments from the largest producer (or shipper), the lower the exponent, and (2) the greater the proportion of total flow which is local (intraregional), the higher the exponent.

Appendix 2 – Glossary of Terms used by STEAM

Initial Expenditure - This figure indicates the amount of initial expenditures or revenue used in the analysis. This heading indicates not only the total magnitude of the spending but also the region in which it was spent (thus establishing the "impact" region).

Direct Impact - Relates ONLY to the impact on "front-line" businesses. These are businesses that initially receive the operating revenue or tourist expenditures for the project under analysis. From a business perspective, this impact is limited only to that particular business or group of businesses involved. From a tourist spending perspective, this can include all businesses such as hotels, restaurants, retail stores, transportation carriers, attraction facilities and so forth.

Indirect Impact - Refers to the impacts resulting from all intermediate rounds of production in the supply of goods and services to industry sectors identified in the direct impact phase. An example of this would be the supply and production of bed sheets to a hotel.

Induced Impact - These impacts are generated as a result of spending by employees (in the form of consumer spending) and businesses (in the form of investment) who benefited either directly or indirectly from the initial expenditures under analysis. An example of induced consumer spending would be the impacts generated by hotel employees on typical consumer items such as groceries, shoes, cameras, etc. An example of induced business investment would be the impacts generated by the spending of retained earnings, attributable to the expenditures under analysis, on machinery and equipment.

Gross Domestic Product (GDP)- This figure represents the total value of production of goods and services in the economy resulting from the initial expenditure under analysis (valued at market prices).

NOTE: *The multiplier (A), Total/Initial, represents the total (direct, indirect and induced) impact on GDP for every dollar of direct GDP. This is a measure of the level of spin-off activity generated as a result of a particular project. For instance if this multiplier is 1.5 then this implies that for every dollar of GDP directly generated by "front-line" tourism businesses an additional \$0.50 of GDP is generated in spin-off activity (e.g. suppliers).*

The multiplier (B), Total/\$ Expenditure, represent the total (direct, indirect and induced) impact on GDP for every dollar of expenditure (or revenue from a business perspective). This is a measure of how effective project related expenditures translate into GDP for the province (or region). Depending upon the level of expenditures, this multiplier ultimately determines the overall level of net economic activity associated with the project. To take an example, if this multiplier is 1.0, this means that for every dollar of expenditure, one dollar of total GDP is generated. The magnitude of this multiplier is influenced by the level of withdrawals, or imports, necessary to sustain both production and

final demand requirements. The less capable a region or province is at fulfilling all necessary production and final demand requirements, all things being equal, the lower the eventual economic impact will be.

GDP (at factor cost) - This figure represents the total value of production of goods and services produced by industries resulting from the factors of production. The distinction to GDP (at market prices) is that GDP (at factor cost) removes indirect taxes and adds subsidies.

Wages & Salaries - This figure represents the amount of wages and salaries generated by the initial expenditure. This information is broken down by the direct, indirect and induced impacts.

Employment - Depending upon the selection of employment units (person-years or equivalent full-year jobs) these figures represent the employment generated by the initial expenditure. These figures distinguish between the direct, indirect and induced impact. "Equivalent Full-Year Jobs", if selected, include both part-time and full-time work in ratios consistent with the specific industries.

NOTE: *The multiplier (B) is analogous to Multiplier (B) described earlier with the exception being that employment values are represented per \$1,000,000 of spending rather than per dollar of spending. This is done to alleviate the problem of comparing very small numbers that would be generated using the traditional notion of a multiplier (i.e. employment per dollar of initial expenditure).*

Industry Output - These figures represent the direct & indirect and total impact (including induced impacts) on industry output generated by the initial tourism expenditure. It should be noted that the industry output measure represents the **sum** total of all economic activity that has taken place and consequently involve double counting on the part of the intermediate production phase. Since the Gross Domestic Product (GDP) figure includes only the **net** total of all economic activity (i.e. considers only the value added), the industry output measure will always exceed or at least equal the value of GDP.

Taxes - These figures represent the amount of taxes contributed to municipal, provincial and federal levels of government relating to the project under analysis. This information is broken down by the direct, indirect and induced impacts.

Imports - These figures indicate the direct, indirect and induced final demand and intermediate production requirements for imports both outside the province and internationally.

Appendix 3 – Comparative Analysis

| | | 2005 | | 2003 | | 2001 | | 1999 | |
|------------------------------------|------------|--------------|----------|---------------|------------------------|----------|----------|--------------|---------------------------|
| | | Saskatchewan | Regina | New Brunswick | Bathurst / Campbellton | Ontario | London | Newfoundland | Corner Brook & Western NF |
| Total expenditures | | \$59.8 M | | \$38.8 M | | \$50.6 M | | \$41.6 M | |
| Total Economic Activity | | \$101.3 M | \$85.2 M | \$70.5 M | \$57.7 M | \$95.8 M | \$66.0 M | \$72.1 M | \$61.0 M |
| GDP | | \$41.0 M | \$32.3 M | \$28.6 M | \$23.6 M | \$46.5 M | \$34.3 M | \$26.5 M | \$21.2 M |
| Employment (full-year jobs) | | 955 | 793 | 1018 | 850 | 862 | 694 | 856 | 701 |
| Wages and Salaries | | \$23.5 M | \$19.5 M | \$20.5 M | \$17.5 M | \$26.6 M | \$19.7 M | \$16.7 M | \$13.8 M |
| Taxes | Federal | \$6.5 M | \$5.2 M | \$4.6 M | \$3.9 M | \$7.6 M | \$5.7 M | \$3.7 M | \$3.0 M |
| | Provincial | \$5.2 M | \$4.3 M | \$4.3 M | \$3.7 M | \$5.6 M | \$4.3 M | \$3.6 M | \$3.0 M |
| | Municipal | \$1.5 M | \$1.2 M | \$1.5 M | \$1.3 M | \$2.2 M | \$1.8 M | \$0.9 M | \$0.7 M |

Appendix 4 – Canada Games Survey

1a (Surveyor - where is the interview being conducted?)

| Week 1 | Week 2 |
|------------------|----------------|
| Baseball | Athletics |
| Basketball | Diving |
| Canoeing | Field Hockey |
| Cycling | Rowing |
| Rugby | Men's Soccer |
| Sailing | Men's Softball |
| Women's Soccer | Volleyball |
| Women's Softball | Wrestling |
| Swimming | |
| Tennis | |

1b (Surveyor – Role of Respondent)

| | |
|----|---------------------------------------|
| 16 | Spectator |
| 17 | Athlete |
| 18 | Official |
| 19 | Chef de Mission/Provincial Delegation |
| 20 | Other |

1c (If response is Athlete, which sport?)

| Week 1 | Week 2 |
|------------------|----------------|
| Baseball | Athletics |
| Basketball | Diving |
| Canoeing | Field Hockey |
| Cycling | Rowing |
| Rugby | Men's Soccer |
| Sailing | Men's Softball |
| Women's Soccer | Volleyball |
| Women's Softball | Wrestling |
| Swimming | |
| Tennis | |

2 Hello, my name is _____. I am conducting a survey to measure the economic impact of this event. Can I please speak to the member in your party who is most able to answer some questions regarding your group and its spending while in Regina?

- | | |
|---|-----|
| 1 | Yes |
| 2 | No |

3 Have you or anyone in your immediate party previously been questioned regarding your spending while in Regina?

- | | |
|---|-----|
| 1 | Yes |
| 2 | No |

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4 Including you, how many people were in your immediate traveling party?
 (Your ITP consists of the people who traveled with you and who participated with you in
 various group activities. If you came with a pre-arranged group, include only those who
 were associated with you personally). Answer: _____

5 In your ITP, how many are aged:

- 18 and under _____
- 19-24 _____
- 25-34 _____
- 35-44 _____
- 45-54 _____
- 55-64 _____
- 65 and over _____?

How many people in your group are women? _____

6 Have you attended any of the following sporting events?

- | Week 1 | Week 2 |
|------------------|----------------|
| Baseball | Athletics |
| Basketball | Diving |
| Canoeing | Field Hockey |
| Cycling | Rowing |
| Rugby | Men's Soccer |
| Sailing | Men's Softball |
| Women's Soccer | Volleyball |
| Women's Softball | Wrestling |
| Swimming | |
| Tennis | |

7 For each sport that you attended, how many times did the AVERAGE
 person in your ITP attend?

- | | Week 1 | | Week 2 |
|------------------|--------|----------------|--------|
| Baseball | _____ | Athletics | _____ |
| Basketball | _____ | Diving | _____ |
| Canoeing | _____ | Field Hockey | _____ |
| Cycling | _____ | Rowing | _____ |
| Rugby | _____ | Men's Soccer | _____ |
| Sailing | _____ | Men's Softball | _____ |
| Women's Soccer | _____ | Volleyball | _____ |
| Women's Softball | _____ | Wrestling | _____ |
| Swimming | _____ | | |
| Tennis | _____ | | |

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8 Have you traveled more than 80km, one-way, to come to Regina?

- 1 Yes
- 2 No

9 Are you spending the night away from your usual place of residence?

- 1 Yes
- 2 No

10 How many day trips is your party making to Regina?

11 Where is your normal place of residence?

If Canada go to province, ask postal code

If U.S. go to state

If Other International, ask country

What Province / State
do you normally
reside in?

- | | | |
|---|--|--|
| <ul style="list-style-type: none"> 1 Ontario 2 Quebec 3 BC 4 Alta 5 Sask 6 Man 7 NB 8 NS 9 PEI 10 NFLD 11 Yukon 12 NWT 13 Nunavut 14 Alabama 15 Alaska 16 Arizona 17 Arkansas 18 California 19 Colorado 20 Connecticut 21 Delaware 22 Florida | <ul style="list-style-type: none"> 23 Georgia 24 Hawaii 25 Idaho 26 Illinois 27 Indiana 28 Iowa 29 Kansas 30 Kentucky 31 Louisiana 32 Maine 33 Massachusetts 34 Michigan 35 Minnesota 36 Mississippi 37 Missouri 38 Montana 39 Nebraska 40 Nevada 41 New Hampshire 41 New Jersey 42 New Mexico 43 New York | <ul style="list-style-type: none"> 44 North Carolina 45 North Dakota 46 Ohio 47 Oklahoma 48 Oregon 49 Pennsylvania 50 Rhode Island 51 South Carolina 52 South Dakota 53 Tennessee 54 Texas 55 Utah 56 Vermont 57 Virginia 58 Washington 59 Washington DC 60 West Virginia 61 Wisconsin 62 Wyoming |
|---|--|--|

or

Country _____

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May I please have the first three digits of your postal code for statistical purposes? (*Canada only*) Answer: _____

12 On this trip, How many nights are you away from home in TOTAL? Answer: _____

13 How many of these nights are in the Province of Saskatchewan? Answer: _____

14 How many of these nights are in the City of Regina? Answer: _____

15 Of the nights in Regina, how many were spent in commercial accommodation? Answer: _____

16 I am now going to ask you some questions regarding the spending of your immediate traveling party while in Regina. Please include the spending by all members of your ITP and what you expect to spend for your entire stay in Regina. How much do you expect to spend for:

- _____ Accommodation
- _____ Restaurants
- _____ Concessions
- _____ Groceries
- _____ Event Tickets
- _____ Other Entertainment
- _____ Event Merchandise
- _____ Other Shopping
- _____ Car Rental (Total)
- _____ Vehicle Expenses (Gas in Regina, Parking, etc.)
- _____ Taxis, Bus, etc.
- _____ Other Spending

17 On a scale from one to 10, how important was the 2005 Canada Games in your decision to come to Regina, with 10 meaning it was the only reason you came to Regina? Answer: _____ (Answers between 1 and 10)

18 Did you extend the duration of a trip you were already taking in order to attend the Canada Games?

- 1 Yes
- 2 No

19 How many extra nights did you spend in:

- _____ Regina
- _____ Rest of Canada

20 Did you change the timing of a trip that you would have usually made to Regina in the next three months in order to attend the Canada Games?

- 1 Yes
- 2 No

Thank you for your time, this completes the survey